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SUGAR SITUATION IN AFRICA, ASIA, LATIN AMERICA AND THE CARIBBEAN, AND OCEANIA: PROBLEMS AND SOLUTIONS*

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Introduction

The objective of this article is to attempt to answer four questions that sum up the current problems of the cane agroindustry in Asia, Africa, Latin America and the Caribbean and Oceania:

- What is the status of the international sugar market at present?
- What are the major causes of this situation?
- What effects has it had on the aforementioned countries?
- What are the solutions deemed valid and effective to remedy this situation?

And in attempting to answer these question we can discuss our role in the sugar world, the manner in which the current crisis has affected our countries and possible means of solving the problems of our industry.

The World Sugar Situation

In response to the first question, the situation of the international sugar market during the present decade may be summarized as follows:

- High stockpiles, which in 1985 reached a peak level of 40 per cent of consumption; and, although the estimate for the current crop year is a level of around 34 per cent, both figures are above the level of 25 per cent considered normal. (Table III)

- Low prices on the international market, with quotations reaching a low of 2.5 cents U.S. currency per pound of raw sugar in June 1985, as a result of the aforementioned surplus supplies. Although prices are currently between 8 and 9 cents, they are still below the production costs of most producing countries. (Table I)

- A standstill in the growth of world consumption, resulting from the campaings against sugar and the inroads made by substitutes -- both caloric and non-caloric sweeteners -- in the markets of the major industrialized countries. The world average for sugar consumption per capita has fallen from a peak level of 21 kgs. in 1979 to slightly above 20 kgs. at present.

In the specific case of the developed capitalist sugar-importing countries, consumption has fallen from a peak of nearly 45 kgs. in 1973 to slightly above 30 kgs. at present.

- A contraction in the import requirements of the free market, the outcome of a combination of the decline in growth rates for consumption and the increased self-sufficiency of some importing countries. Import requirements have fallen from over 21 million M.T.R.V. in 1982 to below 17 million at present.

- A significant rise in the importance of white sugar on the international market, from the 10 per cent of the total it represented in 1970 to nearly per cent today.

The Major Factors on the Market

In answer to the second question, as follows are some of the most relevant causes of the current sugar situation:

- Rising protectionism, particularly by the developed capitalist countries such as the following:

  . The E.E.C., which through a combination of quotas, internal support prices, subsidies and taxes, has become the number two world exporter and the number one exporter to the free market, after having been

a net importer up to 1976.

This situation was fostered by a combination of two factors: the E.E.C. had failed to accede to the 1977 International Sugar Agreement and it also plays a major role as a supplier of white sugar to the world market. (Table XI)

The United States, which, in order to protection its domestic sugar industry, has established conditions for significant inroads by substitutes on its market -- High Fructose Corn Syrup (HFCS) in particular -- with negative effects on its import volumes.

In five years imports have declined considerably and the United States is no longer the number one world importer, with forecasts indicating that if this trend continues the U.S. will not be importing any sugar at all by the end of the decade.

The result of the protectionist policies in these two countries, to which we might also add the case of Japan, is a rise in their exports, on the one hand; and on the other, a decline in imports that leads to a contraction of the available market for the other exporters. The foregoing creates bearish pressure on prices on the free market.

- The failure of attempts to regulate the international market through an agreement with effective economic clauses. A case in point is the 1977 International Sugar Agreement, which failed to achieve its objectives, due, among other factors, to the fact that the E.E.C. did not accede to it, the delay by the United States in ratifying the fact and faults in the design of the economic clauses. Furthermore, efforts to negotiate a new agreement with economic clauses ended unsuccessfully in 1984, which weakened the possibilities that an effective agreement will be achieved in a relatively short period of time.

- The rapid growth of consumption of sugar substitutes -- both caloric and non-caloric -- in some countries. A case in point is the United States, where in 1970 corn sweeteners accounted for 16 per cent of total consumption of caloric sweeteners, whereas at present they represent 52 per cent of the total and have replaced sugar in many sectors of this market. And aspartame, which was launched on the market in 1981, currently accounts for nine per cent of total sweetener consumption.

Effects on the Sugar Situation in Latin America and the Caribbean, Africa, Asia and Oceania

The international sugar situation outlined above has in turn had repercussions on the sugar industries in our countries, which shall be analyzed from the following two perspectives:

- The sugar situation in general
- The effects on exports, as concerns both volumes and value.

1. The sugar situation in Latin America and the Caribbean, Africa, Asia and Oceania.

   a. Latin America and the Caribbean

      This region produces approximately 50 per cent of the cane sugar produced at the world level and an even higher percentage of cane. The foregoing is true because Brazil -- a major cane sugar-producing country -- uses over 60 per cent of its cane to produce alcohol fuel.

      In 1984 sugar output in this region fell to levels similar to those registered in 1978, as a result of the fact that the rise in consumption has failed to

offset the decline in exports. Exports have fallen considerably since 1982 due to adverse conditions on the international sugar market.

Although consumption per capita has remained at a standstill for the past few years, it is noteworthy that levels are high -- 40 kgs. annually -- if compared to the world average of slightly above 20 kgs.

b. Africa

Production in this region has risen at relatively high rates and output is currently about 7.5 million M.T.R.V., while consumption rates continue to grow, for a present level of approximately 8.5 million M.T.R.V.

The outcome is an import requirement of about one million M.T.R.V., lower than that registered at the beginning of the decade of about 1.5 million tons.

Although consumption per capita continues to rise, the rate of approximately 15 kgs. is lower than the world average. The differences in per capita consumption rates are significant, with high levels shown in Northern African countries and the major

exporters, and very low for the other nations.

c. Asia

Although production has recovered from the levels shown in 1984, output is still slightly below the level of over 24 million tons registered in 1982.

Consumption has continued to increase and currently totals nearly 31 million M.T.R.V., which calls for imports requirements of over seven million M.T.R.V.; it is important to point out, however, that these needs totalled nearly eight million M.T.R.V. in 1985. The export level has been declining steadily since 1982, as a result of international quotations, while imports are at the same levels as for the early part of the decade.

It is interesting to note the differences in developments in the three principal countries in the region: China, India and Japan.

Output has risen in China from 2.8 million M.T.R.V. at the beginning of the decade to 5.7 million in 1986, while consumption has increased from 3.6 million to 6.7 million tons during the same period. Thus import requirements have grown from under one

million M.T.R.V. to slightly above one million tons, with imports totalling over two million tons in 1985.

In India production rose from 4.5 million M.T.R.V. to 7.6 million, while consumption increased from 5.0 to 8.7 million M.T.R.V. The result has been an increase in the import requirements of a country that had traditionally been a major sugar exporter. It should also be mentioned that India is also an important producer and consumer of non-centrifugal sugar, the volume of which is not included in the aforementioned figures.

Japan shows a rise in output from 790,000 M.T.R.V. to 950,000 M.T.R.V. and decline in consumption from nearly 3.0 million to 2.7 million M.T.R.V. Thus imports have dropped from 2.3 million to 1.8 million M.T.R.V., all as a result of the protectionist policy on sugar imposed in this country.

In Asia consumption per capita has continued to rise, but levels remain very low -- approximately 11 kgs. annually -- with a noteworthy difference between high consumption rates for the Middle

Eastern countries and the relatively low levels of the other nations.

c. Oceania

Output has dropped slightly since the early part of the decade, when it totalled over 4.1 million tons, while consumption rates have remained constant at about one million M.T.R.V. Thus there has been a decline in the exportable surplus, which is currently below three million M.T.R.V.

Although consumption per capita has fallen below the levels registered in the 1970's, it still averages 44 kgs. annually.

2. Effects on exports

Tables VIII and IX show the development of exports in the various regions, with regard to both volume and value, with nominal and deflated figures.

In drawing up the table we did not include all the countries, but only the traditional exporting nations.

We have taken into account the following three areas: sales to the free market, total sales and exports to the United States.

a. The Free Market

The following changes have occurred between 1975 and 1985: The volume of exports from Latin America and the Caribbean to this market declined slightly, but in economic terms the amount dropped from U.S.$3.336 billion to US$1.268 billion. In constant U.S. dollars (1975) the decrease was from U.S.$3.554 billion to U.S.$880 million.

In Africa the volume rose, while the value of sales fell from 672 million to 244 million dollars, while in constant terms the decline was from US$ 717 million to US$ 168 million.

In Asia sales volumes fell from 3.5 to 2.7 million M.T.R.V., while the sales value dropped from U.S.$1.547 billion to US$425 million; and from U.S.$1.636 billion to US$295 million in constant terms.

In Oceania sales volumes rose from 2.0 to 2.8 million M.T.R.V., whereas the value of sales fell from 874 million to 373 million dollars. In constant terms, the decline was from US$2.751 billion to US$257 million.

If we consider the four groups as a whole, we can see that the total volume was virtually constant, while in value there was a decline from US$6.418 billion to US$2.310 billion. In constant terms the drop was from US$8.657 billion to US$1.599 billion; less than one-fifth of the original value, that is.

b. The Total Market

The decline in income was not as great on this market, due to the fact that there were lower price fluctuations in the special arrangements.

For the four groups as a whole, the volume rose slightly, while the value declined from US$9.510 billion to US$6.924 billion. In constant terms the drop was from US$10.014 billion to US$4.788 billion; less than half the original amount, that is.

c. The United States Market

Table IX shows the figures for the U.S. market, comparing the situation in 1981, the year prior to the imposition of the import quota, to 1987.

As we will see further on, in the case the major effect was not on prices but rather the drastic

decline in the volume of imports.

For Latin America and the Caribbean the volume was lowered from 2.9 million M.T.R.V. to 540,000 M.T.R.V., while the value fell from US$1.368 billion to US$243 million. In 1975 dollars the reduction was from US$924 million to US$132 million.

For Africa the reduction in volume was from 337,000 M.T.R.V. to 81,000 M.T.R.V., while the decline in economic terms was from US$167 million to US$36 million. And in constant terms, this represents a decline of from US$113 million to US$20 million.

For Asia the export volume dropped from 389,000 M.T.R.V. to 150,000 M.T.R.V., while in economic terms the decline was from 185 million to 67 million dollars. In constant terms the drop was from US$125 million to 36 million dollars.

For Oceania the export volume fell from 556,000 M.T.R.V. to 99,000 M.T.R.V, while the value dropped from 251 million to 44 million dollars. The decline in constant terms was from 170 to 24 million dollars.

The drop in volume for the four groups as a whole was from 4.5 million M.T.R.V. to 900,000 M.T.R.V., while in value the amount fell from US$1.971 billion to 409 million. In 1975 dollars the decline was from US$1.332 billion to US$221 million, or 83 per cent.

The aforementioned figures are proof of the negative effects of the international sugar situation on exporting countries, with dire consequences for the economies of these nations.

In many cases the worsening of the situation during the 1980's has forced mills to close, resulting in lower production and, as mentioned above, dire economic, social and political effects.

Possible solutions

Any crisis has a positive side to it that represents a challenge and calls for action to attempt to solve the problem.

Thus we are faced with the alternative of allowing the crisis to defeat us, by accepting the situation and doing nothing about it, or facing it with a positive mental attitude and action that will enable us to find effective, lasting solutions.

GEPLACEA, an organization that groups 22 Latin American and Caribbean traditional sugar producing and exporting countries, realizes that the current situation calls for positive action and concrete proposals to outline a course of action to change the structural features of our sugar cane agroindustry.

These proposed solutions must be placed within a framework of a series of prerequisites, including the following:

- The seriousness of the crisis demands that these measures be applied simultaneously; they should not be considered alternatives to be applied exclusively, because every effort to improve the efficiency of our industry should lead to advantages for buyers under current market conditions. Furthermore, improved market conditions will not have the anticipated benefits if our competitiveness fails to improve.

- The seriousness of the crisis also makes it necessary to co-ordinate all these measures so as to be able to overcome a situation of unprecedented scope and degree.

- The need for concerted efforts at the international level. Although the most pressing measures are the responsibility of countries themselves at the national level, to control the elements within their scope, an

overall solution must be based on an understanding by all participants in the market -- both importers and exporters -- of the need to seek comprehensive, lasting solutions for commodities markets.

- The need, within the overall solutions, to understand the differences that exist among countries and their individual needs. Each nation has peculiarities with regard to its methods of producing and marketing sugar, the importance of domestic market, share of the various markets, levels of diversification, etc. In so far as relations with other countries are concerned, especially the developed countries, it should be understood that "asymmetrical" patterns are needed in collectives policies, patterns that take into account the greater importance of commodities in our economies as opposed to theirs'.

- The need to draw up new criteria for planning economic policies, in which mere profitability is beginning to be questioned in terms of more priorities. To be specific, we have the case of an industry where those of us with a relatively more efficient level than our competitors, are threatened by a market in which it will apparently not be the most efficient producers that survive, but rather those who are have the

greatest financial capacity for keeping afloat their industries.

In this respect, in our opinion the possible solutions may be classified into three main groups:

- First, concerted international action and optimum development of international co-operation in defense of markets and prices.

  In turn, this action calls for participation in other activities, mainly within two international fora:

  1. Effective action within the framework of the International Sugar Organization, so as to make it possible for negotiations to begin as soon as possible with a view to an international agreement with effective economic clauses to regulate the international sugar market and stabilize prices at levels fair for both exporters and importers.

  2. Support to all action related to agricultural negotiations at the Uruguay Round of GATT, so as to achieve a prompt, effective liberalization of the international sugar market as an effective means of curbing the rising current of protectionism that, as we mentioned above, constitutes one of the major

causes of the problems besetting the international sugar market.

3. A continuation of bilateral action, with major exporters and importers, in order to achieve a consensus on the best action to take with regard to the aforementioned problems.

- And second, efforts must be undertaken to further the restructuring of the industry in our countries, so as to adapt it to the changing international circumstances.

In this respect, the principal goal is to increase the promotion of the idea of an integral use of sugar cane, so that it may be used not only as a raw material for sugar but for a wide range of by-products and derivatives.

This action must begin with the creation of awareness of this need, fostering a drastic change in the mentality of an industry that has to stop thinking of itself as the sugar industry and start viewing itself as the sugar cane agroindustry.

On the one hand, this change will make possible an improved regulation of sugar supplies on the

international market and higher profitability by distributing costs among various products.

On the other hand, the integral utilization of sugar cane through the diversification of the industry represents not only a answer to the problems of the international sugar market but mainly a development model, a new industrial project based on sugar cane as a raw material for a variety of products, a process that will vary in line with the specific conditions and circumstances in each country.

- And third, the industry must be modernized so as to raise productivity and improve efficiency and lower production costs, by adapting the many new methods and processes used in the more advanced industrial branches to our industry.

  The use of biotechnology, an optimum use of processes, an improvement in the energy balances and a growing use of computers are a few of the means to attain this objective.

The prompt application of some of the solutions offered, so as to offset the seriousness of the crisis, would be one positive contribution to solving the serious problems besetting our cane agroindustry at present.

RAW SUGAR WORLD PRICE
ANNUAL AVERAGE
1948-87

TABLE 1

YEAR	NOMINAL CT\LB	DEFLACTED CT\LB	NOMINAL DLS\MT	DEFLACTED DLS\MT	INDEX 1975
1948	4.23	9.61	94.78	215.40	.44
1949	4.16	10.15	93.21	227.34	.41
1950	4.98	13.46	111.58	301.57	.37
1951	5.67	12.89	127.04	288.73	.44
1952	4.17	9.27	93.43	207.63	.45
1953	3.41	7.93	76.40	177.68	.43
1954	3.26	7.76	73.04	173.91	.42
1955	3.24	7.53	72.60	168.83	.43
1956	3.48	7.73	77.97	173.27	.45
1957	5.16	11.22	115.61	251.34	.46
1958	3.50	7.78	78.42	174.27	.45
1959	2.97	6.60	66.55	147.88	.45
1960	3.14	6.83	70.35	152.95	.46
1961	2.91	6.19	65.20	138.73	.47
1962	2.98	6.34	66.77	142.06	.47
1963	8.50	18.09	190.45	405.21	.47
1964	5.87	12.23	131.52	274.01	.48
1965	2.12	4.33	47.50	96.94	.49
1966	1.86	3.80	41.68	85.05	.49
1967	1.99	3.98	44.59	89.18	.50
1968	1.98	3.96	44.36	88.73	.50
1969	3.37	6.48	75.51	145.21	.52
1970	3.75	6.94	84.02	155.60	.54
1971	4.52	7.79	101.28	174.61	.58
1972	7.41	11.95	166.03	267.79	.62
1973	9.59	13.14	214.87	294.35	.73
1974	29.60	33.26	663.22	745.19	.89
1975	20.49	20.49	459.10	459.10	1.00
1976	11.60	11.60	259.91	259.91	1.00
1977	8.11	7.44	181.71	166.71	1.09
1978	7.81	6.25	174.99	139.99	1.25
1979	9.87	6.90	221.15	154.65	1.43
1980	29.01	18.36	650.00	411.39	1.58
1981	16.93	11.40	379.33	255.41	1.49
1982	8.55	5.88	191.57	131.79	1.45
1983	8.50	6.04	190.45	135.44	1.41
1984	5.18	3.81	116.06	85.42	1.36
1985	4.09	2.98	91.64	66.67	1.37
1986	6.07	3.69	136.00	82.77	1.64
1987	6.71	4.08	150.34	91.49	1.85

SOURCE: PREPARED BY GEPLACEA

WORLD SUGAR BALANCE TABLE II
1962\86

1000 MTRV KGS

YEAR	PRODUC.	CONSUMP.	F. STOCKS	EXPORT	IMPORT	P.CAPUT/CONS.
1962	51,227	53,455	23,851	18,529	18,297	17.3
1963	51,894	54,343	20,867	16,869	16,621	17.3
1964	59,319	54,158	24,564	16,826	16,316	17.2
1965	63,790	57,962	28,226	18,649	18,120	18.0
1966	62,741	59,754	29,355	18,235	18,231	18.3
1967	65,026	61,602	31,395	20,197	19,622	18.5
1968	65,411	64,744	31,030	20,589	19,225	19.1
1969	68,140	66,847	32,345	18,571	18,769	19.3
1970	71,142	70,480	31,586	21,808	21,339	19.9
1971	71,975	72,457	30,644	21,035	20,644	20.3
1972	73,735	73,660	30,109	21,871	21,234	20.4
1973	75,789	76,330	29,343	22,478	22,427	20.7
1974	76,397	77,303	27,895	22,097	21,519	20.0
1975	78,846	74,438	32,065	20,599	20,495	18.9
1976	82,400	79,241	34,266	22,794	21,783	19.7
1977	90,350	82,592	40,623	28,471	26,869	20.2
1978	90,832	86,354	43,630	25,072	24,807	20.7
1979	89,342	90,287	41,639	25,985	25,058	21.2
1980	84,489	88,590	37,455	26,832	26,746	20.2
1981	92,769	90,022	39,126	29,142	28,222	19.8
1982	101,810	92,637	47,270	30,427	29,587	20.2
1983	96,911	93,606	49,153	28,981	27,730	20.0
1984	99,217	96,348	51,357	28,485	27,973	20.3
1985	99,551	97,778	51,654	27,762	26,510	20.2
1986	100,222	100,854	51,147	26,692	27,064	20.4

NOTE: PRODUCTION, CONSUMPTION, IMPORTS AND EXPORTS IN 1000 MTRV.
PER CAPUT CONSUMPTION IN KG.
PRICES IN CENTS OF DOLLAR PER LB.

SOURCE: INTERNATIONAL SUGAR ORGANIZATION

WORLD SUGAR BALANCE
GEPLACEA
1000 MTV.

TABLE III

	1980\81	1981\82	1982\83	1983\84	1984\85	1985\86	1986\87	1987\88
INITIAL STOCKS	26170	23433	31353	37269	37229	39523	37957	37327
PRODUCTION	86969	99097	99636	95308	100251	98691	102063	102120
TOTAL AVAILABLE	113139	122530	130989	132577	137480	138214	140020	139447
CONSUMPTION	89706	91177	93720	95348	97957	100257	102693	103797
FINAL STOCKS	23433	31353	37269	37229	39523	37957	37327	35650
FINAL STOCKS\CONSUMPTION	26.12	34.39	39.77	39.05	40.35	37.86	36.35	34.35
CHANGE IN STOCKS	-2737	7920	5916	-40	2294	-1566	-630	-1677
WEEKS OF CONSUMPTION	13.58	17.88	20.68	20.30	20.98	19.69	18.90	17.86
CHANGE % IN PRODUCTION		13.95	.54	-4.34	5.19	-1.56	3.42	.06
CHANGE IN PRODUCTION		12128	539	-4328	4943	-1560	3372	57
CHANGE % IN CONSUMPTION		1.64	2.79	1.74	2.74	2.35	2.43	1.08
CHANGE IN CONSUMPTION		1471	2543	1628	2609	2300	2436	1104

SOURCE: Prepared by GEPLACEA

LATINAMERICA AND CARIBBEAN
SUGAR STATISTICS
1000 MTRS

TABLE IV

YEAR	PRODUCTION	CONSUMPTION	PROD-CONS	EXPORT	IMPORT	EXP-IMP	PER CAPUT CONSUMPTION
1969	18996	9751	9245	9147	304	8843	33.74
1970	21998	10099	11899	11563	170	11393	34.22
1971	21141	10683	10458	10598	247	10351	35.54
1972	21084	11100	9984	11154	367	10787	36.25
1973	23970	11525	12445	11937	402	11535	36.95
1974	24027	12248	11779	12193	267	11926	38.55
1975	23597	12950	10647	11168	259	10909	40.02
1976	25096	13349	11747	10577	248	10329	40.50
1977	27246	13550	13696	13041	651	12390	40.36
1978	27133	14119	13014	12575	721	11854	41.28
1979	26508	15135	11373	12853	668	12185	43.45
1980	26028	15717	10311	12039	1672	10367	44.29
1981	27387	15451	11932	12853	1593	11260	42.75
1982	28306	15921	12385	13456	1507	11949	43.24
1983	28479	15559	12920	13336	1856	11480	41.49
1984	28812	16211	12601	13180	1230	11950	42.44
1985	28057	16561	11496	12466	409	12057	43.26
1986	27771	17145	10626	11709	471	11238	43.50
AVERAGE							
1969\71	20712	10178	10534	10436	240	10196	34.50
1974\76	24240	12849	11391	11313	258	11055	39.69
1979\81	26640	15434	11205	12582	1311	11271	43.50
1984\86	28213	16639	11574	12452	703	11748	43.07
CHANGE							
%							
1975\70	17.04	26.25	8.14	8.40	7.35	8.43	15.04
1980\75	9.90	20.12	-1.63	11.22	408.14	1.95	9.59
1985\80	5.91	7.81	3.29	-1.03	-46.35	4.24	-.99

Per Caput Consumption is in kgs.

SOURCE: Prepared by GEPLACEA with figures from the I.S.O.

AFRICA

TABLE V

SUGAR STATISTICS

1000 MTPV

YEAR	PRODUCTION	CONSUMPTION	PROD-CONS	EXPORTS	IMPORTS	EXP-IMP	PER CAPUT CONSUMPTION
1969	4329	3822	507	1984	1246	738	11.20
1970	4606	4114	492	2020	1540	480	11.80
1971	4939	4449	490	2047	1664	383	12.40
1972	5391	4597	794	2320	1713	607	12.60
1973	5376	4841	535	2366	1748	618	12.80
1974	5419	4947	472	2194	1791	403	12.70
1975	5219	5100	119	1851	1699	152	12.80
1976	5690	5448	242	2138	2104	34	13.40
1977	6113	5887	226	2873	2569	304	13.90
1978	6069	6202	-133	1927	2948	-1021	14.30
1979	6171	6518	-347	2259	2643	-384	14.30
1980	5970	7044	-1074	2357	3052	-695	15.10
1981	6453	7537	-1084	2111	3505	-1394	15.70
1982	7024	7690	-666	2392	3537	-1145	15.00
1983	6450	7983	-1533	2211	3647	-1436	12.10
1984	7088	7826	-738	2206	3373	-1167	14.50
1985	7483	8091	-608	2547	3307	-760	14.70
1986	7409	8428	-1019	2630	3575	-945	14.80
AVERAGE							
1969\71	4625	4128	496	2017	1483	534	11.80
1974\76	5443	5165	278	2061	1865	196	12.97
1979\81	6198	7033	-835	2242	3067	-824	15.03
1984\86	7327	8115	-788	2461	3418	-957	14.67
CHANGE							
%							
1975\70	17.69	25.11	-44.06	2.18	25.71	-63.21	9.89
1980\75	13.88	36.17	-400.72	8.80	64.46	-519.86	15.94
1985\80	18.21	15.38	-5.59	9.75	11.47	16.13	-2.44

Per caput Consumption is in kgs.

SOURCE: Prepared by GEPLACEA with figures from the I.S.O.

ASIA

TABLE VI

SUGAR STATISTICS

1000 MTRV

YEAR	PRODUCTION	CONSUMPTION	PROD-CONS	EXPORTS	IMPORTS	EXP-IMP	PER CAPUT CONSUMPTION
1969	10422	12999	-2577	1951	5578	-3627	6.50
1970	11802	14487	-2685	2259	5893	-3634	7.20
1971	11621	15578	-3957	2722	6034	-3312	7.70
1972	11180	15776	-4596	2584	6357	-3773	7.50
1973	11736	15817	-4081	2724	6781	-4057	7.50
1974	13357	15877	-2520	3585	6242	-2657	7.40
1975	14182	15332	-1150	3703	6043	-2340	7.00
1976	15564	16743	-1179	4405	6052	-1647	7.40
1977	16616	19059	-2443	5430	8457	-3027	8.30
1978	17866	21212	-3346	3485	8424	-4939	9.10
1979	17609	23382	-5773	3749	8642	-4893	9.80
1980	14697	21289	-6592	3395	8721	-5326	8.50
1981	18219	23178	-4959	3510	8623	-5113	8.60
1982	24403	25054	-651	4676	10192	-5516	9.40
1983	21985	26342	-4357	3973	8553	-4580	9.70
1984	21971	28224	-6253	3676	9517	-5841	10.40
1985	22290	30197	-7907	3343	11085	-7742	10.90
1986	23541	30879	-7338	3136	10445	-7309	11.00
AVERAGE							
1969\71	11282	14355	-3073	2311	5835	-3524	7.13
1974\76	14368	15984	-1616	3898	6112	-2215	7.27
1979\81	16842	22616	-5775	3551	8662	-5111	8.97
1984\86	22601	29767	-7166	3385	10349	-6964	10.77
CHANGE							
%							
1975\70	27.35	11.35	-47.40	68.68	4.75	-37.16	1.87
1980\75	17.22	41.49	257.27	-8.89	41.71	130.76	23.39
1985\80	34.19	31.62	24.09	-4.68	19.48	36.26	20.07

Per Caput Consumption is in kgs.

SOURCE: Prepared by GEPLACEA with figures from the I.S.O.

OCEANIA . .

TABLE. VII

SUGAR STATISTICS

1000 MTRV

YEAR	PRODUCTION	CONSUMPTION	PROD-CONS	EXPORTS	IMPORTS	EXP-IMP	PER CAPUT CONSUMPTION
1969	2632	917	1715	1883	180	1703	48.00
1970	2857	950	1907	2009	194	1815	48.40
1971	3105	965	2140	2133	202	1931	48.60
1972	3190	935	2255	2605	187	2418	47.80
1973	2886	982	1904	2400	195	2205	49.60
1974	3236	1009	2227	2095	217	1878	49.70
1975	3214	1004	2210	2231	192	2039	48.60
1976	3702	1013	2689	2878	203	2675	48.40
1977	3821	1016	2805	3283	220	3063	47.30
1978	3336	1023	2313	2299	196	2103	47.00
1979	3419	1042	2377	2438	195	2243	47.20
1980	3868	1018	2850	2862	231	2631	45.80
1981	3999	1028	2971	3398	157	3241	44.60
1982	4153	1026	3127	2921	217	2704	44.30
1983	3593	996	2597	2781	179	2602	42.00
1984	4146	993	3153	2990	216	2774	41.60
1985	3838	1012	2826	3082	188	2894	41.80
1986	3976	1069	2907	3048	210	2838	44.20
AVERAGE							
1969\71	2865	944	1921	2008	192	1816	48.33
1974\76	3384	1009	2375	2401	204	2197	48.90
1979\81	3762	1029	2733	2899	194	2705	45.87
1984\86	3987	1025	2962	3040	205	2835	42.53
CHANGE							
%							
1975\70	18.13	6.85	23.67	19.57	6.25	20.98	1.17
1980\75	11.17	2.05	15.04	20.74	-4.74	23.10	-6.20
1985\80	5.97	-.45	8.39	4.85	5.32	4.82	-7.27

Per Caput Consumption is in kgs.

SOURCE: Prepared by GEPLACEA with figures from the I.S.O.

CHANGE IN EXPORTS — TABLE VIII
EXPORTERS COUNTRIES

COUNTRIES	FREE MARKET			TOTAL MARKET		
	1000 MTRV	Mill DLS	Mill DLS*	1000 MTRV	Mill DLS	Mill DLS*
L.A. & C.						
1974\76	6821	3326	3554	11176	5909	6206
1984\86	6485	1268	880	12325	5503	3811
DIFFERENCE	-336	-2058	-2674	1149	-405	-2395
AFRICA						
1974\76	1418	672	717	2025	973	1032
1984\86	1604	244	168	2350	543	372
DIFFERENCE	186	-428	-549	325	-430	-660
ASIA						
1974\76	3471	1547	1636	3503	1562	1652
1984\86	2716	425	295	2727	429	297
DIFFERENCE	-755	-1122	-1341	-776	-1133	-1355
OCEANIA						
1974\76	2045	874	2751	2401	1066	1124
1984\86	2841	373	257	3028	448	308
DIFFERENCE	795	-500	-2494	627	-618	-816
TOTAL						
1974\76	13755	6418	8657	19104	9510	10014
1984\86	13646	2310	1599	20429	6924	4788
DIFFERENCE	-110	-4108	-7058	1325	-2587	-5226

* Deflated value

SOURCE: Prepared by GEPLACEA with figures from I.S.O.

CHANGE IN IMPORTS
UNITED STATES

TABLE IX

ORIGIN	1000 MTRV	Millions of Dls. Nominal	Millions of Dls. Deflated*
L.A.& C.			
1981	2946	1368	924
1987	541	243	132
DIFFERENCE	-2405	-1125	-792
AFRICA			
1981	337	167	113
1987	81	36	20
DIFFERENCE	-256	-131	-93
ASIA			
1981	389	185	125
1987	150	67	36
DIFFERENCE	-240	-118	-89
OCEANIA			
1981	556	251	170
1987	99	44	24
DIFFERENCE	-457	-207	-146
TOTAL			
1981	4549	1971	1332
1987	908	409	221
DIFFERENCE	-3641	-1562	-1111

* Deflated value with base 1975.

SOURCE: Prepared by GEPLACEA with figures from I.S.O.

UNITED STATES — TABLE X
SUGAR IMPORTS
1970\87
1000 MTRV

YEAR	TOTAL
1970	4840
1971	5969
1972	4952
1973	4835
1974	5250
1975	3515
1976	4228
1977	5291
1978	4257
1979	4436
1980	3802
1981	4646
1982	2393
1983	2667
1984	3021
1985	2275
1986	1796
1987	908

SOURCE: PREPARED BY GEPLACEA WITH DATA FROM I.S.O.

ECONOMIC EUROPEAN COMMUNITY TABLE XI
NET EXPORTS
1970\86

YEAR	1000 MTRV
1970	-1441
1971	-1332
1972	-809
1973	-801
1974	-1999
1975	-2196
1976	-578
1977	509
1978	1562
1979	2146
1980	2894
1981	4049
1982	4145
1983	3394
1984	2821
1985	2985
1986	2496

SOURCE: I.S.O.

JAPAN
SUGAR IMPORTS
1970\86

TABLE XII

YEAR	1000 MTRV
1970	2480
1971	2366
1972	2754
1973	2445
1974	2853
1975	2546
1976	2513
1977	2789
1978	2353
1979	2686
1980	2334
1981	1636
1982	2239
1983	1868
1984	1903
1985	1986
1986	1823

SOURCE: I.S.O.

GEPLACEA

GROUP OF LATIN-AMERICAN AND CARIBBEAN SUGAR EXPORTING COUNTRIES
SECRETARIAT

SUGAR SITUATION IN AFRICA, ASIA, LATIN AMERICA AND THE CARIBBEAN, AND OCEANIA: PROBLEMS AND SOLUTIONS

Expert Group Meeting

Sugar Cane Processing Industry Meeting

United Nations Industrial Development Organization

(UNIDO)

Guangzhou, People's Republic of China

March 22-24, 1988

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